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Succession Planning at Art of Élan



INSTITUTE FOR
MUSIC LEADERSHIP



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In 2007, violinist Kate Hatmaker and flutist Demarre McGill founded Art of Élan, a presenter of chamber music concerts for the San Diego metropolitan area. The group offers art music performances of a wide variety in venues outside of the traditional concert hall. Since the inception of Art of Élan, Hatmaker has sought the right balance of personnel across the organization. In 2017, she was introduced to the idea of succession planning through a coaching program for local leaders guided by current or former CEOs of not-for-profits. Her eyes were opened to understanding the roles people played in her organization, as well as to considering long-term plans for Art of Élan. The case reveals the draft of a strategic plan, which includes attention to future staffing and financial goals for the organization. With the loss of Art of Élan's director of community engagement, Hatmaker took up this role, in addition to her position as executive director and artistic director. At the same time, she is interested to see if or how Art of Élan could survive without her full attention to these areas.



This case study was prepared by Michael Alan Anderson, Associate Professor of Musicology at the Eastman School of Music. *The Eastman Case Studies* are developed solely as the basis for class discussion. Cases are not intended to serve as endorsements or sources of primary data nor are they to serve as illustrations of effective or ineffective leadership or decision making.

Pathways to Chamber Music

"It's our mission to prove to people that classical music is alive and relevant in the 21st century." Kate Hatmaker sounded a familiar mantra of musical arts organizations as co-founder of Art of Élan, a presenter of chamber music concerts for the San Diego metropolitan area. Hatmaker, a violinist, hatched the idea for Art of Élan with flutist Demarre McGill in 2007. Both musicians were members of the San Diego Symphony and were eager for new horizons of music-making that could enrich the cultural life of their city. The mission of Art of Élan is to offer "exciting and exceptional" concerts that expose "diverse audiences to classical music through innovative programming, the commissioning of new works, unique

performance venues, and personal connections with concertgoers." The French word *élan* captures the spirit and vigor that the organization aims to impart to audiences with its musical offerings.

Through Art of Élan, the duo is reinventing the experience of chamber music, an already intimate proposition with roots in domestic environments. Reinventing the genre – for San Diegans at least – has taken different forms for the chamber music group. Art of

Élan has changed a stagnant environment of classical concert norms by presenting brief one-hour concerts without intermission that sustain audiences start to finish. Innovative programming is a staple of Art of Élan's season offerings. The organization presents what it calls

"mix-tape" programming, a reference to a collage of classical and contemporary musical works that intermingle and are recontextualized by their juxtaposition. Art of Élan's commitment to commissioning and premiering new works of music has allowed the organization to develop relationships with emerging artists and composers around the world.

Hatmaker and McGill have also insisted on offering their music in fresh contexts away from the stereotypical stuffy performance hall. Venues such as art museums, galleries, and even warehouse spaces are not uncommon sites for Art of Élan's concert presentations, now at ten per year. Connections with the visual arts have become a cornerstone of the concert season, including partnerships with the San Diego Museum of Art, the San Diego Art Institute, and the city's Museum of Contemporary Art. The array of venues is designed in part to attract diverse audiences and effectively grow the base of art music patrons rather than to vie for a greater share of them. Developing new audiences to build the enterprise and the category has meant reaching out to the San Diego community. Hatmaker remarked: "Our vision is to make sure classical music has an enormous impact and transformative effect on people's lives, and one of the ways we can do that is through community engagement."

As Art of Élan's executive director in addition to its artistic director, Hatmaker has forged a number of partnerships that center on young people in San Diego. The "Crossfire" concert series targets young urbanites in the neighborhoods of Barrio Logan and the East Village. Here, the programming marries classical repertoire with music from a variety of genres including electronic music, in an effort to place listeners in a "crossfire" of musical ideas. Further to developing a diverse audience of young people for

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chamber music, Art of Élan organized an annual ten-week residency with A Reason to Survive (ARTS), an organization that believes in the power of the arts and creativity to transform lives, especially those of children facing adversity. Now in its fourth year, the residency, known as the “Young Artists in Harmony” program, consists mainly of weekly workshops each fall where ARTS students have the opportunity to compose works for an ensemble and to be mentored by its musicians. The residency culminates in two concerts that feature all student pieces. These works are professionally recorded and made available for free download and streaming. Mentorship of disadvantaged youth through the musical arts has blossomed in another direction for Art of Élan, namely in the Emerging Leaders Program at Mira Mesa High School in San Diego. 85% of Mira Mesa students come from minority groups and almost half of the students live in poverty.¹ Members of Art of Élan provide entrepreneurship seminars for music students that focus on leadership skills and creativity. Students develop an ensemble with a shared vision and devise programming and marketing based on target demographics.

The engagement of youth in San Diego expanded in the 2017-18 concert season to include cultural exchange with communities outside of the city, in particular Tijuana, just across the U.S-Mexico border. Entitled “Musical Pathways,” the season in part features cross-border initiatives. Tijuana-based composer and double bassist Andrés Martin was commissioned by Art of Élan to write compositions for the NOW ensemble, which secured a two-year residency with Art of Élan. NOW premiered Martin’s works at both the San Diego Museum of Art and in Tijuana. Professional musicians in Baja were also invited to perform in San Diego.

Keenly focused on the goal of cultural engagement and exchange, Art of Élan named Jory Herman the organization’s first director of community engagement. Hatmaker saw this new role as an important part of a growth phase for her enterprise. Herman was already a fixture on Art of Élan’s programs and a member of the San Diego Symphony. This new position responded to a need the organization had witnessed. In Hatmaker’s words: “[We’ve sometimes] struggled with developing the diverse audiences we set out to attract. One thing we learned is that it’s important to really get to know the various communities and neighborhoods that make up this incredibly vibrant city, and partnerships and collaboration are key to doing that.”²

Hatmaker saw the director of community engagement role as an important part of a growth phase for her enterprise.

Succession Planning

Finding the right balance of personnel has been on Hatmaker’s mind since the inception of Art of Élan. As co-founder, she formed the organizational mission and thus has personal investment in seeing it accomplished. On the other hand, Art of Élan could not develop at its current pace without others contributing to the enterprise. Hatmaker and McGill launched in 2007. Hatmaker already serves as executive director and artistic director and has overseen strong growth of the organization. In 2017, Art of Élan celebrated its tenth anniversary, which featured several one-time commissions. Contributed revenue skyrocketed 72% to support these special projects. But even the previous year saw a 27% increase in contributed revenue.

¹ <https://www.usnews.com/education/best-high-schools/california/districts/san-diego-unified-school-district/mira-mesa-high-3206>

² <http://sdvoyager.com/interview/meet-kate-hatmaker-art-elan-downtown/>

Supporting this expanding operation were two part-time contractors in addition to Hatmaker's directorship, which itself was not full time because she also plays with the San Diego Symphony. In 2017, one of the contractors served in the role of operations coordinator, while the other handled both accounting and donor relations. Even with the hire of Jory Herman, help was needed at Art of Élan.

Around the time of Herman's hire, Hatmaker accepted an invitation from the Fieldstone Leadership Network to participate in a coaching program for local leaders in Orange County and San Diego. The coaches are current or former CEOs of not-for-profits in the region, and Hatmaker was paired with a coach who met with her each month over the course of a year. Her meetings not only included organizational self assessment tools and a 360-degree professional assessment, but also gave her space to step back from her day-to-day responsibilities and take stock of her enterprise. With the room to create a vision for Art of Élan, Hatmaker used the coaching sessions to map out short- and long-range goals for Art of Élan. She completed worksheets that articulated a vision for the organization to be an effective model for a small presenting arts organization and a sought-after collaborator with major arts presenters in Southern and Baja California. Noting Hatmaker's role as artistic director, executive director, and board member, her coach discussed the concept of succession planning with her. Succession planning involves preparations for transitions of executive leadership in organizations. Hatmaker learned that almost two-thirds of not-for-profit organizations do not have a written plan for unexpected departures of its top leaders. Her coach explained that there were steps she could take now with the board president of Art of Élan to avoid this potential situation.

With the help of her coach, Hatmaker began succession planning by identifying Art of Élan's particular challenges as an organization and anticipating large questions on the horizon. Then, she considered matching leadership qualities needed to weather the challenges successfully. Were there opportunities for staff and board members to develop leadership skills in an effort to "groom" a future executive director? Expanding responsibilities of current staff members and cross-training them in the various functions of the business would also soften the impact of an abrupt change in leadership. Could Art of Élan formalize an interim leader to assist with these transitions? Ultimately, Hatmaker would need James Robbins, board president of Art of Élan, to work with her toward a succession plan that could sustain the organization if she could not run it.

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Changes and Roles

A glimpse of Art of Élan under new leadership had been in consideration ever since co-founder and co-artistic director Demarre McGill was named principal flutist of the Dallas Symphony in 2013, after having held the same position with the San Diego Symphony. McGill eventually relocated to Seattle for a position with its symphony in 2017, with which he had also been associated since 2011. No longer an active contributor to the organization, he would now serve Art of Élan in an advisory capacity only. The hiring of Jory Herman was meant to blunt some of the impact of McGill's departure, with

the hope that he might grow into an artistic director for Art of Élan.

Hatmaker's roles as artistic and executive director were destined to transform in the absence of her co-founder, but she too foresaw the possibility of her own withdrawal from her full responsibilities with Art of Élan changing in the near future. Hatmaker had one young child and was about to give birth to her second within a few months. She imagined she might need to curtail some of her responsibilities after her baby's arrival, not only with Art of Élan but also with the San Diego Symphony. She designated the 2018-19 season ahead as a "year of structure" to develop plans to sustain the organization, with an eye toward her work as executive director.

The board of Art of Élan is an active one and displays a disciplined sense of governance for the organization. In 2015, Board President James Robbins asked Hatmaker to formalize job descriptions for the various roles in Art of Élan. Job descriptions force executives to articulate what is expected from particular positions or contractors and what personal qualities can positively impact these roles. Hatmaker wrote short job summaries of those serving the organization beginning with her own (**Appendix 1**). She kept the roles of executive and artistic director separate, knowing it would be wise to keep these positions detached for the long-term health of Art of Élan. The degree to which the executive director interacted with the artistic director was substantial nonetheless, as the brief descriptions revealed. Although chiefly concerned with the operations and financial well-being of the organization, the executive director "may assist the artistic director with creative aspects of season programming and concert presentation" and likewise may help the artistic director "make decisions about performance commitments and personnel choices for such

performances." On the other hand, the artistic director naturally oversees "all of the creative aspects of season programming and concert presentation" but also "should assist with fundraising and donor cultivation," not unlike the executive director. Jory Herman's recently-created role as director of community engagement was also summarized. His responsibilities not only included outreach efforts in the San Diego community but specifically encompassed supervision of the "Young Artists in Harmony" program mentioned earlier.

Job descriptions for the two part-time contractors for Art of Élan remained. The operations coordinator, currently held by local professional tuba player Bryan Smith, is "primarily concerned with the logistics and coordination of personnel for each concert." The summary also includes qualities sought in these contractors. "In addition to having strong leadership skills, the operations coordinator should have excellent problem-solving and communication skills." Finally, the accounting and donor relations coordinator, Elizabeth Brown (a professional cellist), is charged with ensuring proper bookkeeping and maintaining financial records for Art of Élan, in addition to working with the executive director to manage donor relations and other development needs. These descriptions were independent of the personnel in service to the organization at present, thereby allowing any restructuring to focus on the responsibilities of staff, without regard for their personalities.

From Coach to Board

With job descriptions sketched out, Kate Hatmaker was eager to continue steps on a path toward sustainability for Art of Élan. She was brimming with questions that bear on the issue of succession planning. What areas are most urgent to address for the managerial stability at Art of Élan? What

institutional knowledge did she have that should be documented if she did not have the capacity to operate the enterprise? What steps could be taken now to ensure the long-term financial and administrative health of Art of Élan? Hatmaker raised these awakened concerns with board presi-

dent Robbins. Together, the executive director and board president drafted a document, which Hatmaker privately dubbed “strategic planning lite”

(Appendix 2). With the help of a strategic planning consultant hired by Art of Élan, Hatmaker articulated a series of goals for the short and medium term that included several of the ideas she encountered in her year of professional mentoring. Hatmaker and

Robbins used this document as an opening salvo to a five-year strategic plan, which the board had been discussing.

With the consultant’s guidance, Hatmaker and Robbins developed four broad goals for Art of Élan in the planning document, two of them aimed at stabilizing the organization and preparing it for the long run. The other two were related to the audiences that the presenter serves with its art. Of the initial two geared toward sustainability, the first involved governance of Art of Élan. It was proposed that Art of Élan will “strengthen, expand, and diversify its board of directors.” For each goal, tangible objectives followed. In this case, two objectives were laid out: (1) develop a “board manual to orient and clearly state expectations for board members” and (2) increase the board to 12 members with diverse representation. A board manual was a simple but crucial guide

to help current board members understand their responsibilities to Art of Élan. The manual would not only gather together basic organizational information (such as bylaws, financial snapshots, and strategic plans) but also set forth expectations for board giving, time commitments to the organizations, and requirements for work on board committees. Committees would clearly be described along with updated schedules of meetings. The board manual was a living document that would undergo light revision each year.

Robbins and Hatmaker further knew that increasing board membership with a diverse group of leaders would help ensure the durability of Art of Élan. The two resolved to develop connections between three different target groups that could produce possible board members and bolster the enterprise for the long term: young professionals, women and minorities; and corporations. These were not mutually exclusive categories of course. Some businesses have programs which match an employee to local board vacancies. Perhaps it was not unthinkable within such a program to recruit a young female professional, possibly from a racial minority. Although Hatmaker and Robbins could make inroads toward increasing board membership, they also wanted the existing members themselves to assist in this search. Each board member would be asked to identify and bring one board prospect to a meeting. A small committee of board members also could tap into their contacts to assist in recruitment. Among those prospective members, Hatmaker and Robbins could also screen for the capacity to provide regular and substantial donations to Art of Élan and to target specific geographic areas of San Diego where the organization wished to cultivate future programming.

In addition to organizational governance, the planning document addressed another crucial

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area—financial sustainability. Hatmaker and Robbins declared in this heading, “Art of Élan will be financially stable through consistent growth of 20% each year for three consecutive years.” In support of this ambitious end, they proposed four objectives, beginning with a business plan that would chart the course for earned income and contributed income. In consultation with one or more board members, the executive director and board president would develop targets for ticket sales, subscriptions, and fee-for-service programs for earned income. On the contributed income side, they would similarly set goals for corporate sponsorships, foundation grants, and individual donations. Cost projections for programming, staff, and systems would also be necessary to reach the desired growth goal.

The second objective under financial sustainability was general agreement to setting a minimum

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requirement of grants to be submitted to corporate and private foundations each year. A target minimum of 20 submissions was put forward as a starting point over a twelve-month grants calendar. Increased grant submissions do not necessarily equate to increased grant awards, but a more disciplined schedule of proposals and submissions was a task that was within reach for the executive director and a grant writer. Currently, Art of Élan contracts with

a local grant writer for assistance, roughly ten hours per grant. This function was shared by the executive director, who also applied for several grants.

Beyond corporate and foundation grants, contributed income also included individual giving. In this area, the objective was to strengthen donor relationships. Hatmaker suggested a few actions to take toward this objective. One idea was to investigate Customer Relationship Management (CRM) software. At present, Art of Élan maintains a 900-subscriber email list, a separate database of donors, and records of ticket sales only from certain concerts. (Most Art of Élan concerts occur in partnership with organizations that retain customer purchasing information.) In its most basic form, CRM systems are designed to gather these disparate records and capture interactions between an organization and customers across different platforms. Points of contact may then converge between channels. In addition to sales and subscribers, the software presents an opportunity to collect customer information from website visits, phone conversations, social media, and other interactions. The selection of a CRM system would be costly, but nonetheless the investigation of this technology remained an objective of the short term. Outside of technology, relationships with supporters could be strengthened through other means. Staff and board members together could take steps to both acknowledge donors at concerts and send handwritten thank you notes for their patronage. Other communication with current donors could include explaining the benefits of various support levels and encouraging upgrades to higher sponsorship levels for Art of Élan.

For earned income, Hatmaker and Robbins set an objective to develop a paid product or service that would supplement the traditional revenue streams of tickets sales and donations. It was mentioned earlier that Art of Élan has partnered with A Reason to Survive (ARTS) and delivered the “Young Artists in Harmony” program with ten weeks of music workshops for disadvantaged youth. This was the

kind of paid service that could be expanded. A goal was to determine the cost of the program and the viability of offering it at an additional location with donor support. Partnerships with other organizations, such as the San Diego Youth Symphony, could also be explored for different enrichment programs.

Personnel Matters

Finally, the executive director and board president of Art of Élan sought to define precise staffing and contractor needs in the strategic planning document. The area was of keen interest to Hatmaker as founder of the chamber music presenter. Already having developed job descriptions for current roles, Hatmaker and the board president took further steps toward a sustainable staffing model. They proposed approaching the question of staffing from the “ground up.” Based on the financial goals they had articulated in the document, they delineated the specific job responsibilities and estimated the number of hours required to accomplish the various goals of the administration, apart from musician compensation and artistic programming. In theory, these functions would not involve titles, only tasks and projected wages. Their calculations brought them close to where Art of Élan had already been, but with some notable changes.

Hatmaker and Robbins believed that more hours were needed for a grant writer, currently on contract for ten hours per grant and an estimated six grants per year. The executive director would move to a full-time position with a 27% pay increase. The director of community engagement would become a half-time position (currently at quarter-time status) with a doubled wage accordingly. Robbins proposed changing the title of operations coordinator to production manager, which would continue in a quarter-time capacity and assist at concert sites. The title of operations

coordinator would still be retained, however, and a new quarter time hire would be put in place to assist the executive director with administrative needs. Elizabeth Brown’s position of accounting and donor relations coordinator would remain as a part-time contract position but wages would nearly triple to \$19,000 per year for the upcoming fiscal year. By 2020, Robbins suggested that a full-time artistic director of Art of Élan be hired with a \$30,000 salary. While the salary may seem low for a full-time directorship, it is in keeping with those offered by similar small arts organizations in the San Diego area. Hatmaker was pleased that her two administrative roles were now effectively split in this neutral planning model.

No sooner had the document been completed with ideas for sustainability than another departure hit Art of Élan. Jory Herman, who had served as the director of community engagement for less than a year, announced that he had accepted full-time work with the Los Angeles Philharmonic and would be leaving the San Diego area immediately. As she had done with the exit of Demarre McGill, Hatmaker accepted Herman’s responsibilities for the short term. Her capacity to undertake now three organizational roles would be stretched thin. She was rather hoping to draw down some of her commitments to the organization, but there was no one to shoulder the tasks of executive director, artistic director, and director of community engagement for Art of Élan. Hatmaker had envisioned that the document she drafted with Robbins would be examined by the board over the next several months, but changes would have to be afoot sooner. The “year of structure” was meant to be a time to clarify her role and to ensure the viability of Art of Élan for the long term. But decisions would need to be made quickly.

Hatmaker considered a few scenarios on the horizon. Of course, she could cover the three roles she had been handed. Having the most institutional knowledge, she would be well qualified to handle all of the tasks. But time was a factor. Her second child was now due in a matter of weeks, and she yearned for more time to raise her young ones. She also had full-time work already secured with the San Diego Symphony. What would happen if she walked away for a year to play only with the San Diego Symphony in order to see if Art of Élan could stand on its own? Hatmaker had outlined the existing and future roles and responsibilities of staff in her organization and had further submitted goals to finance those positions. If Art of Élan transitioned to the proposed staffing model, it may not be well positioned to withstand her full departure. There was no support yet for the new model; it was developed only in concept.

What if Hatmaker instead walked away from the symphony to stabilize Art of Élan? Helping Art of Élan was crucial, given the loss of two key positions—executive director and artistic director. Hatmaker considered taking one of the three roles for the upcoming concert season, but the situation dictated that she might need to take all three. Eventually, she could gravitate to one of the positions, but which one? The executive director job would take the most time; the director community engagement, the least. Further, Hatmaker was skeptical that professionals could be hired to service all of Art of Élan's needs. An executive director would be particularly difficult to find. Specific arts administration knowledge and chamber music appreciation would be needed for this role, and a search could take months. Were Hatmaker to transition to the full-time executive directorship of Art of Élan, it would be a risk of its own, as it would mean giving up the steady income of the San Diego Symphony. The symphony offered a one-year sabbatical, so perhaps a short-term scenario

could be worked out. Board President Robbins needed to know quickly what Hatmaker wanted to do in light of Herman's departure. They set up a meeting to discuss Hatmaker's future with the organization.

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APPENDIX 1

Current Job Descriptions Art of Élan

Executive Director

The Executive Director reports to the board and oversees all the administrative and financial aspects of the organization. May assist the Artistic Director with creative aspects of season programming and concert presentation, but is primarily concerned with operations and sound financial management. Should also assist with fundraising and donor cultivation, and, along with the Artistic Director, helps make decisions about performance commitments and personnel choices for such performances.

Artistic Director

With some input from the Executive Director, the Artistic Director plans, organizes, and manages the artistic activities of the organization. Responsible for all of the creative aspects of season programming and concert presentation. Should assist with fundraising and donor cultivation, and makes all decisions about performance commitments and personnel choices for such performances. Reports to the board.

Director of Community Engagement

The Director of Community Engagement is primarily involved with outreach and engagement efforts in the community. Assists both the Executive Director and Artistic Director with the planning, executing, and funding of various outreach efforts, particularly with the “Young Artists in Harmony” outreach program at A Reason To Survive (ARTS). Reports to the Executive Director.

Operations Coordinator

The Operations Coordinator reports to the Executive Director and oversees day-to-day operations of the organization. May assist the Executive Director and Artistic Director with event planning and marketing, but is primarily concerned with the logistics and coordination of personnel for each concert. In addition to having strong leadership skills, the Operations Coordinator should have excellent problem-solving and communication skills.

Accounting and Donor Relations Coordinator

Reports to the Executive Director and is in charge of bookkeeping and the maintenance of accurate financial records. Assists the Executive Director with donor relations and other development needs.

APPENDIX 2

Art of Élan Strategic Plan Draft

PROPOSED MISSION

To reinvent the way people experience classical music.

PROPOSED VISION

To be a model for how to keep classical music relevant in the 21st century.

INTRODUCTION

Art of Élan was founded in 2007 by Kate Hatmaker and Demarre McGill. 2017 marks the ten-year anniversary of the organization and highlights the need to create a clear path for the future. As opportunities continue to be presented for future programs and collaborations, Art of Élan has the chance to consider which elements will be the focus for a stronger, more robust organization.

This strategic plan captures the concepts and directions by the board and staff as developed through a series of surveys, conversations, and strategic planning sessions. It is intended to be a roadmap and a resource over the coming three to five years. Each goal is meant to reach beyond existing capabilities to encourage strategic growth and long-term success of the organization.

GOAL - Governance: Art of Élan will strengthen, expand, and diversify its board of directors.

1. **Objective:** Strengthen existing board structure by developing a board manual to orient and clearly state expectations for board members.

Timeframe: TBD

Goal Team Members: Executive Director and Governance Committee

Tactics

- a. Board manual should include five types of material:
 1. Organizational information including history and mission of Art of Élan, bylaws, legal documents, financial data, and strategic plans.
 2. Board member expectations including board giving, required time commitments (minimum number of board meetings to attend), and requirements for committee work.
 3. Descriptions of all committees and their roles.
 4. Schedules for full board meetings and any other regularly scheduled meetings as well as significant events.
 5. Contact and biographical information on board members.
- b. Adopt the new board manual.
- c. If any new policies are created for the purpose of the board manual that pertain to board expectations, ensure all board members fully understand the new policies.

- d. Should any current board members be unwilling to abide by policies adopted, they should roll off the board.

2. Objective: Increase board to 12 members with diverse representation from groups such as young professionals, minorities, and women. Tap into varied geographic areas of San Diego. Explore corporate relationships and contact those with a greater capacity to give.

Timeframe: TBD

Goal Team Members: Executive Director, Governance Committee, and Full Board

Tactics

- a. Overall:
 - 1. Each current board member should bring one potential board member name for consideration by a given date.
 - 2. Request that selected advisory board members assist in recruiting board members.
 - 3. Descriptions of all committees and their roles.
 - 4. Schedules for full board meetings and any other regularly scheduled meetings as well as significant events.
- b. Engage with at least a specified number of groups that work with Young Professionals.
 - 1. Consider working with groups such as Rising Arts Leaders.
 - 2. Partnerships with Museum of Contemporary Art San Diego's Young Collectors group or San Diego Museum of Art's Gallery group would provide access to young professionals with an interest in the arts.
- c. By a given date, engage with a specified number of groups that work with women and minorities.
 - 1. Look to specialized groups such as the Women's Foundation (part of the San Diego Foundation) to recruit.
 - 2. Consider partnerships with or performances at locations with diverse audiences.
- d. By a given date, engage with a specified number of groups that work with corporations.
 - 1. Reach out to Qualcomm and San Diego Gas & Electric/ Sempra, businesses that have programs which will match an employee with a board.
 - 2. Look to vendors who may already be connected through existing board members. For example, if a board member's company uses a financial, HR, or payroll service, those vendors may have staff who would make good board members.
- e. By a given date, engage with a specified number of groups that will assist with finding potential board members with capacity.
 - 1. Look to other like-minded organizations and their boards to determine if there are appropriate cross-over board members.
- f. By a given date, engage with a specified number of groups that work with individuals from geographic regions of interest:

1. Look to groups and programs targeted toward audiences in areas such as South Bay, East and North County. Consider building relationships for both audience and potential board members.
 - a. Examples might include La Athenaeum which has locations in both La Jolla and Logan Heights; Poway Center for the Arts; Jacobs Center for Neighborhood Innovation in Market Creek Plaza; and Oceanside Museum of Art.

GOAL - Financial Sustainability: Art of Élan will be financially stable through consistent growth of twenty percent each year for three consecutive years.

1. Objective: Develop a business plan that will create a roadmap for earned and contributed income.

Timeframe: TBD

Goal Team Members: Executive Director, President, two Directors with business background

Tactics

- a. Determine targets for contributed income opportunities, including annual fund solicitations, sponsorships, and grants.
- b. Develop targets for earned income opportunities, including ticket sales, subscriptions, and fee-for-service programs.
- c. Determine costs for staff and systems over the next three to five years to ensure sustainability and growth.

2. Objective: Increase contributed revenue by submitting a target number of grants to private and corporate foundations and government entities, and working toward progressively more impactful grants.

Timeframe: TBD

Goal Team Members: Executive Director and Grant Writer

Tactics

With the grant writer as the lead:

- a. Identify at least three distinct operating/program pitches that would be attractive to private and corporate foundations as well as government entities. For example, Young Artists in Harmony; Free Community Concert Experiences; commissions.
- b. Develop a 12-month grants calendar with a minimum of 20 prospects. Calendar to include information such as: funder name, contact info, due date, guidelines, solicitation range.
- c. Submit a minimum of 3 grants between specified dates.
- d. Submit a minimum of 6 grants between specified dates.
- e. Submit a minimum of 9 grants between specified dates.
- f. Build grants program to progressively submit more complex grants, from funders outside San Diego with larger returns over the life of the grants program.

3. Objective: Increase donations from individuals by deepening donor relationships and clearly communicating benefits of support.

Timeframe: TBD

Goal Team Members: Executive Director, Donor Relations Coordinator, and Development Committee

Tactics

- a. Investigate Customer Relationship Management (CRM) databases to house donor, subscriber, and ticket purchaser information.
- b. Increase the communication with current donors to strengthen existing relationships.
- c. Clearly communicate benefits at various levels of giving to inspire donors to upgrade donations.
- d. In addition to staff, invite board members to acknowledge donors at concerts and through thank-you letters and other handwritten notes.

4. Objective: Explore a paid product or service that can provide revenue outside of tickets sales or donations.

Timeframe: TBD

Goal Team Members: Executive Director, Director of Community Engagement, Finance Committee

Tactics

- a. Analyze Young Artist in Harmony model.
- b. Price out costs to offer at additional location/s.
- c. Reach out to existing donors, subscribers, and ticket purchasers to determine interest.
- d. Consider partnership with another organization such as San Diego Youth Symphony as pipeline.
- e. Determine price point for program.
- f. Schedule pilot program.

5. Objective: Defining staffing/contractor needs and associated costs.

Timeframe: TBD

Goal Team Members: Executive Director, Board President, and Board Vice-President

Tactics

- a. In conjunction with other identified goals, determine specific needs and number of hours required to support operations, administration, marketing, fundraising, and outreach.
Positions may include:
 1. Executive director: increase to FT in FY 2019; increase from \$51,000 to \$65,000.
 2. Community Engagement: hire at .25 FTE (\$12K), but increase to .5 FTE and \$25K going forward.
 3. Operations Coordinator: change title to Production Manager in FY 2018 and continue at .25 FTE and \$12K going forward.

4. Accounting/Donor relations: increase of \$4,200 to \$12K in FY 2019.
 5. Grant writer: increase from 4K to 7K in FY 2019.
 6. Co-Artistic Director: target a new hire at \$30K in FY 2020.
 7. Operations Coordinator: hire new position in FY 2020 at .25 at \$12K.
- b. Increase musician payments

GOAL - Audience Development: Expand and deepen opportunities for people to experience Art of Élan.

- 1. Objective:** Connect more deeply with current audiences through improved understanding of their interests and behavior.

Timeframe: TBD

Goal Team Members: Executive Director, Individual with marketing knowledge, Operations Staff

Tactics

- a. Develop a survey to learn more about Art of Élan subscribers and ticket purchasers.
 1. Demographic information (e.g. age range; gender; ethnic background; job/career, children or grandchildren)
 2. Geographic information (e.g. Where do they live? Where do they like to attend events? How far would they be willing to travel to attend an event?)
 3. Psychographic information (e.g. What other cultural programs do they attend? Where are they members/subscribers? What do they do for leisure?)
 4. Other (e.g. When would they be most interested in attending events? Favorite composer/Specific musical interests? What do they appreciate/love most about Art of Élan?)
- b. Offer survey through multiple channels:
 1. Survey of existing Art of Élan subscribers/donors (online)
 2. Survey of event ticket buyers (at concert/s)
- c. Analyze data to determine commonalities. Use this data to:
 1. Better connect with, understand, and talk to individuals at concerts;
 2. Create more impactful and resonant solicitations and acknowledgement letters;
 3. Inform future practices such as possible locations for concerts; possible new collaborations for concerts; time of day of concerts, composers to consider, etc.

- 2. Objective:** Produce free community programs that introduce audiences to classical music.

Timeframe: TBD

Goal Team Members: Executive Director, Director of Community Engagement, Operations Coordinator

Tactics

Through partnerships with community organizations, Art of Élan will ensure those who may not have access to classical music have an opportunity to engage with it either for the first time, or through an ongoing program.

- a. Through the Young Artists in Harmony program, offer workshops and apprenticeships to students in San Diego with culminating concerts that highlight original compositions by students.
- b. In collaboration with community groups throughout the county, present 2-3 free concerts to local audiences each year.

3. Objective: Expand and diversify audiences by more widely marketing selected events and including larger venues.

Timeframe: TBD

Goal Team Members: Executive Director, PR Consultant, Operations Coordinator

Tactics

- a. Each season, include at least one larger venue and/or collaboration to which an increased audience could be driven.
- b. With PR Consultant as the lead, determine which events would benefit from an advertising campaign and which advertisements would be most impactful for expanding audiences.
- c. Determine advertising budget for season.
- d. During ticket purchase ask where individual heard about Art of Élan to determine which channels were most successful.

4. Objective: Improve and increase communications to Art of Élan universe.

Timeframe: TBD

Goal Team Members: Executive Director, PR Consultant, Operations Coordinator

Tactics

- a. Engage an IT specialist to analyze and streamline all channels of communication including social media, email-marketing, and website.
- b. Create a calendar of content segmented by audience (website visitors, donors, ticket purchasers, community members etc.).
- c. Delegate creation and management of communication vehicles across multiple team members.
- d. Establish a process for communication including:
 1. Creation of content
 2. Review & approval
 3. Set up & posting
 4. Analysis of hits/opens

GOAL - Artistic: Art of Élan will ensure each artistic series serves its intended audience.

1. Objective: Produce 7-10 concerts each year

Timeframe: TBD

Goal Team Members: Executive Director and Operations Staff

Tactics

- a. Mix larger venues with more intimate venues in order to increase audience access and income.
 - 1. Produce 5-6 gallery concerts per year serving museum audiences.
 - 2. Produce 2-3 Crossfire concerts per year serving younger audiences.
 - 3. Produce 1-2 collaborations in a larger venue serving partner audiences.
- b. Partner with one organization outside of San Diego (such as Palm Springs or Baja California) serving partner audiences.

2. Objective: Commission 1-2 pieces of original work each year.

Timeframe: TBD

Goal Team Members: Executive Director

Tactics

- a. Engage up and coming and established musicians to create new works for world premieres.
- b. Develop partnerships in Los Angeles and Tijuana to co-present programs to increase impact.

3. Objective: Work with an Ensemble-in-Residence to elevate visibility beyond San Diego.

Timeframe: TBD

Goal Team Members: Executive Director and Director of Community Engagement

Tactics

- a. Work with in-state Ensemble-in-Residence so they can take on elements of community engagement.



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